MARKET & SELL

MARKETING STRATEGY TEMPLATE

Turn business objectives into focused, measurable market action.

2026 EDITION • PRACTICAL BUSINESS RESOURCE

01 / STRATEGIC FOUNDATION

Marketing Strategy on One Page

Define the business result, market focus, value proposition, priority audience, and operating choices before selecting channels or creating campaigns.

Planning period and review date

Business objective this strategy must support

Primary marketing objective

Strategic choice	Decision
Priority audience	
Customer problem or desired progress	
Primary offer	
Distinct value proposition	
Positioning statement	
Primary conversion action	
Priority channel mix	
Success measure	

Strategy test: A useful marketing strategy makes clear choices about whom to serve, what value to communicate, where to compete for attention, and what will not receive resources during this planning period.

02 / OBJECTIVES

Set Business-Aligned Marketing Goals

Marketing goals should describe a measurable change in awareness, demand, acquisition, conversion, retention, or customer value - and connect directly to business performance.

Goal	Business result	Metric	Baseline	Target	Deadline	Owner
1						
2						
3						

Marketing funnel priorities

Stage	Customer behavior	Business objective	Priority	Primary measure
Awareness			High / Med / Low	
Consideration			High / Med / Low	
Conversion			High / Med / Low	
Onboarding			High / Med / Low	
Retention			High / Med / Low	
Advocacy			High / Med / Low	

Constraints and assumptions

Budget, capacity, seasonality, market conditions, dependencies, or risks

_____

_____

_____

_____

03 / AUDIENCE

Define the Priority Customer

A strategy becomes more effective when it addresses a specific customer, buying situation, desired outcome, and decision process. Describe the audience using evidence rather than stereotypes.

Priority segment name and description

_____

_____

Problem, need, or desired progress

_____

_____

Audience dimension	Evidence-based description
Context and trigger	
Current behavior or alternative	
Desired outcome	
Functional criteria	
Emotional or social considerations	
Barriers, risks, and objections	
Decision makers and influencers	
Information sources and trusted voices	
Buying process and timing	
Reasons to choose or reject us	

Evidence used: ☐ Interviews ☐ Sales conversations ☐ Service records ☐ Analytics ☐ Market research ☐ Other: _____

04 / POSITIONING

Clarify the Market Position and Message

Positioning defines the place you intend to occupy in the customer's mind. Messaging translates that position into clear, credible communication for each stage of the decision journey.

For [priority audience] who [need or situation], our [offer/category] is the [distinct frame] that [primary value] because [reasons to believe].

_____

_____

_____

_____

Message architecture

Layer	Decision
Core promise	
Primary benefit	
Functional proof	
Emotional or social value	
Reasons to believe	
Most important objection and response	
Call to action	

Message discipline

- ☐ Clear enough to understand quickly
- ☐ Specific enough to be meaningful
- ☐ Relevant to the priority audience
- ☐ Differentiated from credible alternatives
- ☐ Supportable with evidence
- ☐ Consistent with the delivered experience

05 / OFFER STRATEGY

Connect Value, Offer, and Conversion

Marketing cannot compensate for an unclear offer. Define the customer outcome, scope, price logic, risk reduction, proof, and next step before increasing promotion.

Offer element	Decision
Offer name and category	
Customer outcome	
Core deliverables or components	
Price and payment structure	
Primary proof or credibility	
Guarantee, trial, demonstration, or risk reduction	
Availability, eligibility, or qualification	
Primary call to action	
Follow-up or next-best offer	

Offer ladder

Stage	Offer	Purpose	Conversion action
Entry			
Core			
Expansion			
Retention			

What must be true for the offer to deliver the promised value?

_____

06 / CUSTOMER JOURNEY

Design the Path from Attention to Advocacy

Map what customers are trying to accomplish at each stage, what may prevent progress, and how marketing and operations will support the next decision.

Stage	Customer question	Required experience	Content / proof	Next action
Awareness				
Consideration				
Conversion				
Onboarding				
Experience				
Retention / advocacy				

Friction and recovery

Journey friction	Likely impact	Planned response	Owner

Single most important journey improvement during this planning period

07 / CHANNELS

Select a Focused Channel Portfolio

Choose channels based on audience behavior, strategic fit, economics, measurement, and operating capacity. A smaller, well-managed portfolio usually outperforms a scattered presence.

Channel	Role in journey	Audience fit	Cost / effort	Measurement	Decision
Website / SEO					Invest / Test / Maintain / Stop
Email / CRM					Invest / Test / Maintain / Stop
Organic social					Invest / Test / Maintain / Stop
Paid search					Invest / Test / Maintain / Stop
Paid social					Invest / Test / Maintain / Stop
Partnerships / affiliates					Invest / Test / Maintain / Stop
Events / community					Invest / Test / Maintain / Stop
Public relations					Invest / Test / Maintain / Stop
Direct outreach					Invest / Test / Maintain / Stop
Marketplace / retail					Invest / Test / Maintain / Stop

Priority channel plans

Channel	Objective	Audience	Core activity	Cadence	Owner
1					
2					
3					

What we will deliberately not pursue during this period

08 / CONTENT

Build a Content and Communication System

Content should help the customer make progress, strengthen trust, and support a specific business objective. Define themes, formats, distribution, ownership, and reuse before filling a calendar.

Content pillar	Audience question	Business purpose	Proof / expertise	Primary formats
1				
2				
3				
4				

Editorial operating plan

Activity	Cadence	Creator	Approver	Distribution	Reuse
Long-form insight					
Email					
Social / short-form					
Case study / proof					
Campaign asset					

Voice, tone, claims, accessibility, legal, or brand standards

09 / CAMPAIGNS

Plan Integrated Campaigns

A campaign coordinates a defined audience, objective, offer, message, channels, assets, timing, budget, and measurement. Design the full conversion and follow-up path before launch.

Campaign field	Plan
Campaign name and period	
Objective and target	
Priority audience	
Offer and call to action	
Core message	
Channel sequence	
Required assets	
Conversion path	
Follow-up / nurture	
Budget and owner	
Success and stop criteria	

Campaign production schedule

Milestone	Owner	Due	Status / dependency
Brief approved			
Creative produced			
Landing path built			
Tracking tested			
Launch approved			
Performance review			

10 / INVESTMENT

Allocate Budget and Capacity

Allocate resources to strategic priorities, not historical habit. Include internal time, external partners, production, technology, media, events, and contingency.

Investment category	Planned	Actual	Owner / note
People / internal capacity			
Agency / specialist support			
Content and creative production			
Paid media			
Technology and data			
Events and partnerships			
Research and testing			
Contingency			
TOTAL			

Unit economics assumptions

Measure	Current	Target	Definition / source
Average revenue per customer			
Gross margin			
Customer acquisition cost			
Lead-to-customer conversion			
Payback period			
Customer lifetime value			

Budget approval conditions and reallocation rules

11 / MEASUREMENT

Create the Performance System

Select a small set of measures that connect market activity to customer behavior and business results. Define each measure, source, owner, cadence, and decision threshold.

Metric	Stage	Definition	Source	Cadence	Target	Owner

Review questions

- ☐ What changed in the market, audience, offer, or customer journey?
- ☐ Which activities produced qualified progress rather than superficial activity?
- ☐ Where are customers stopping, delaying, or requiring additional proof?
- ☐ Which channels and campaigns show credible contribution relative to cost?
- ☐ What should be scaled, improved, tested, paused, or stopped?
- ☐ Which assumptions require new research or direct customer evidence?

Reporting cadence: Weekly operating review: _____ Monthly performance review: _____ Quarterly strategy review: _____

12 / EXECUTION

Build the 90-Day Marketing Plan

Convert the strategy into sequenced commitments with accountable owners, due dates, dependencies, and measurable outcomes.

Period	Strategic focus	Priority deliverables	Success measure
Days 1-30			
Days 31-60			
Days 61-90			

Priority action register

Action	Owner	Due	Dependency	Status

First decision or action to complete within 48 hours

_____

_____

Approval: _____ Date: _____ Next formal review: _____

13 / REFERENCE NOTES

Use Guidance

This template is designed to create a focused, evidence-based marketing strategy. Complete it collaboratively with the people responsible for business strategy, customer insight, sales, service delivery, finance, and execution.

Recommended working sequence

Step	Working decision
01	Confirm the business objective and planning period.
02	Use customer and market evidence to select the priority audience.
03	Clarify positioning, message, offer, and customer journey.
04	Select a focused channel and content portfolio.
05	Plan campaigns, budget, ownership, and operating capacity.
06	Define measurement, review cadence, and decision thresholds.
07	Translate the strategy into a 90-day execution plan.

Quality check

- ☐ The strategy supports a defined business objective.
- ☐ The priority audience is based on evidence.
- ☐ The position and offer are specific, credible, and differentiated.
- ☐ The channel portfolio matches audience behavior and operating capacity.
- ☐ Content and campaigns support a mapped customer journey.
- ☐ Budget, owners, metrics, review cadence, and stop criteria are documented.
- ☐ The first 90 days contain realistic, sequenced commitments.

Important: This template provides general business-planning guidance. It does not constitute legal, privacy, advertising, accessibility, financial, or tax advice. Validate claims, consent practices, disclosures, and regulatory requirements for your business and markets.

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